Work Manager

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Egrants External User Tasks and Alerts Quick Start Guide

This Quick Start Guide will describe the possible tasks and alerts that can appear in your Egrants Work Manager.

Note: All external users with security to an agency have access to Work Manager and can receive tasks and alerts.

We begin with a definition of task and alert:

Task: A task is a work item that must be performed. If a User receives a task, some action must be taken within Egrants on your Application or Report to clear the task. The Primary Contact associated with each application/subgrant will receive all tasks.

Alert: An alert is a notification of an event that has occurred or of an activity that is pending within the Egrants system regarding your Application or Report. No action by the recipient is required. The User can manually clear any alerts received.

How you will know you have a task or an alert:

Whenever a task or alert is sent to your **Work Manager**, you will be contacted via email. Emails are sent once a day. The email will not tell you the specifics of the task or alert in your Work Manager, it will simply prompt you to check it. You will not receive notice of a task or alert if you have already read the new task or alert.

The following definitions explain the various pieces of information identified with each task and alert:

Ref Num: A unique number by type of task or alert used by ICJI to identify each specific task and alert.

Action: The action is always Create or Clear. This indicates that the task or alert is going to be created when the trigger occurs or, if the task is cleared, when the trigger occurs. It may be action on the part of the External User, ICJI staff or it may be a system-generated action.

Type: Type refers to either a "task" or an "alert."

Category: This refers to the various areas within Egrants such as applications, concept papers, program reports, etc.

User Action: This refers to the action taken by the External User, ICJI staff or a system-generated action that triggers the task or alert.

Title: This refers to the title that appears in the Work Manager for the task or alert.

Recipients: This refers to who will receive either the task or alert.

Trigger: The trigger identifies what action has occurred to result in a task or an alert being created.

Screen Name: This refers to the destination screen if the link is selected in work manager. This will transfer you to the screen name identified here in order to review or perform the desired action.

The tasks and alerts below are listed alphabetically by category. The categories include:

Applications
Concept Papers
Continuations
Fiscal (Fiscal Reports)
Inventory Reports
Modifications (Project Modification Requests)
Program Reports
User Management (Registration and Security Role establishment)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2525   **Action:** Create   **User Action:** Awarded

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was awarded.

Trigger: Status changed to „Open-Awarded" and Save button hit on main summary for Application

Screen Name: Application - Application Summary (extProjectMgmtAP_Summary)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2525   **Action:** Create   **User Action:** Awarded

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was awarded.

Trigger: Status changed to „Open-Awarded" and Save button hit on main summary for Application

Screen Name: Application - Application Summary (extProjectMgmtAP_Summary)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2527   **Action:** Create   **User Action:** Disapproved

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was closed and disapproved.

Trigger: Status changed to „Closed-Disapproved" and Save button hit on the main summary

Screen Name: Application - Issues/Comments Listing (extProjectMgmtAP_IssuesComments)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2000   **Action:** Create   **User Action:** Issues/Comments Review Required

Recipients: Contact, Financial Officer, Project Director

Trigger: Release All External Issues and Comments' button is selected on egProjectMgmtPR_IssuesComments

Screen Name: Application - Issues/Comments Listing (extProjectMgmtAP_IssuesComments)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2530   **Action:** Create   **User Action:** Rejection

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was closed for Administration Rejection

Trigger: Status changed to „Closed- – Adminstrative Rejection" and Save button hit on main summary page

Screen Name: Application - Issues/Comments Listing (extProjectMgmtAP_IssuesComments)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2532   **Action:** Create   **User Action:** Returned

Recipients: External Application Contact, Project Director, and Financial Officer that the application was Returned.

Trigger: Status changed to „Open-Returned" and Save button hit on egProjectMgmtAP_MainSummary

Screen Name: Application - Issues/Comments Listing (extProjectMgmtAP_IssuesComments)

Category: Applications   **Title:** Application Title   **Type:** Alert
Ref Num: 2521   **Action:** Create   **User Action:** Withdrawn

Recipients: Contact, Signatories, Financial Officer, Project Director

Trigger: Status changed to 'Closed-Withdrawn' and Save button hit on egProjectMgmtAP_MainSummary

Screen Name: Application - Main Summary section (extProjectMgmtAP_MainSummary)

| **Category:** Applications | **Title:** Application Title | **Type:** Task |
| **Ref Num:** 2553 | **Action:** Create | **User Action:** Retu rned |

Recipients: External Contact

Trigger: Status changed to „Open-Returned" and Save button hit on egProjectMgmtAP_MainSummary

Screen Name: Application - Issues/Comments Listing (extProjectMgmtAP_IssuesComments)

| **Category:** Applications | **Title:** Application Title | **Type:** Task |
| **Ref Num:** 2509 | **Action:** Clear | **User Action:** Retu rned |

Recipients: External Contact

Trigger: Submit Application button hit on extProjectMgmtAP_Summary

Screen Name: No Destination - Task is removed.

| **Category:** Concept Papers | **Title:** Concept Paper Title | **Type:** Alert |
| **Ref Num:** 2003 | **Action:** Create | **User Action:** Issues/Comments Review Required |

Recipients: Contact, Financial Officer, Project Director

Trigger: Release All External Issues and Comments' button is selected on egProjectMgmtPR_IssuesComments

Screen Name: Concept Paper - Issues/Comments Listing (extProjectMgmtCP_IssuesComments)

| **Category:** Concept Papers | **Title:** Concept Paper Title | **Type:** Alert |
| **Ref Num:** 2524 | **Action:** Create | **User Action:** Withdrawn |

Recipients: Contact, Signatories, Financial Officer, Project Director

Trigger: Status changed to 'Closed-Withdrawn' and Save button hit on egProjectMgmtCP_Summary

Screen Name: Concept Paper - Summary (extProjectMgmtCP_Summary)

| **Category:** Continuations | **Title:** Continuation Title | **Type:** Alert |
| **Ref Num:** 2526 | **Action:** Create | **User Action:** Awarded |

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was awarded.

Trigger: Status changed to „Open-Awarded‟ and Save button hit on main summary for Continuation

Screen Name: Continuation - Summary (extProjectMgmtCO_Summary)

| **Category:** Continuations | **Title:** Continuation Title | **Type:** Alert |
| **Ref Num:** 1413 | **Action:** Create | **User Action:** Continuation Response Due |

Recipients: External Contact, Project Director & Financial Officer

Trigger: Additional phases available and current date is a given number of days (150) before the project end date

Screen Name: Project - Project Summary (extProjectMgmtPR_Summary)

| **Category:** Continuations | **Title:** Continuation Title | **Type:** Alert |
| **Ref Num:** 2528 | **Action:** Create | **User Action:** Disapproved |

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was closed and disapproved.

Trigger: Status changed to „Closed-Disapproved‟ and Save button hit on the main summary

Screen Name: Continuation - Issues/Comments Listing (extProjectMgmtCO_IssuesComments)

| **Category:** Continuations | **Title:** Continuation Title | **Type:** Alert |
| **Ref Num:** 2001 | **Action:** Create | **User Action:** Issues/Comments Review Required |

Recipients: Contact, Financial Officer, Project Director

Trigger: Release All External Issues and Comments' button is selected on egProjectMgmtPR_IssuesComments

Screen Name: Continuation - Issues/Comments Listing (extProjectMgmtCO_IssuesComments)

Category: Continuations   **Title:** Continuation Title   **Type:** Alert
Ref Num: 2531   **Action:** Create   **User Action:** Rejection

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was closed for Administration Rejection

Trigger: Status changed to „Closed- – Adminstrative Rejection" and Save button hit on main summary page

Screen Name: Continuation - Issues/Comments Listing (extProjectMgmtCO_IssuesComments)

Category: Continuations   **Title:** Continuation Title   **Type:** Alert
Ref Num: 2533   **Action:** Create   **User Action:** Returned

Recipients: External Application Contact, Financial Officer, Project Director, Signatories and Financial Officer that the application was Returned.

Trigger: Status changed to „Open-Returned" and Save button hit on egProjectMgmtCO_Summary

Screen Name: Continuation - Issues/Comments Listing (extProjectMgmtCO_IssuesComments)

Category: Continuations   **Title:** Continuation Title   **Type:** Alert
Ref Num: 2522   **Action:** Create   **User Action:** Withdrawn

Recipients: Contact, Signatories, Financial Officer, Project Director

Trigger: Status changed to 'Closed-Withdrawn' and Save button hit on egProjectMgmtCO_Summary

Screen Name: Continuation - Main Summary section (extProjectMgmtCO_MainSummary)

Category: Continuations   **Title:** Continuation Title   **Type:** Task
Ref Num: 2554   **Action:** Create   **Jser Action:** Retu rned

Recipients: External Contact

Trigger: Status changed to „Open-Returned" and Save button hit on egProjectMgmtCO_Summary

Screen Name: Continuation - Issues/Comments Listing (extProjectMgmtCO_IssuesComments)

Category: Continuations   **Title:** Continuation Title   **Type:** Task
Ref Num: 2510   **Action:** Clear   **Jser Action:** Returned

Recipients: External Contact

Trigger: Submit Application button hit on extProjectMgmtCO_SummaryMain

Screen Name: No Destination - Task is removed.

Category: Fiscal   **Title:** Project Phase Title   **Type:** Alert
Ref Num: 1502   **Action:** Create   **User Action:** Approved

Recipients: External Contact, Project Director and Financial Officer for the project

Trigger: Approve' button is clicked on egProjectMgmtMN_FiscalReportsUpdate

Screen Name: Monitoring - Quarterly Subgrantee Report (extProjectMgmtMN_FiscalReportsUpdate)

Category: Fiscal   **Title:** Project Phase Title   **Type:** Alert
Ref Num: 1503   **Action:** Create   **User Action:** Fiscal Report
    Returned

Recipients: Internal Program Contact , Project Director, Financial Officer, Contact

Trigger: Revise button hit on egProjectMgmt_FiscalReportsUpdate by internal staff

Screen Name: Monitoring - Quarterly Subgrantee Report (extProjectMgmtMN_FiscalReportsUpdate)

Category: Fiscal   **Title:** Project Phase Title   **Type:** Alert
Ref Num: 1411   **Action:** Create   **User Action:** Fiscal Reports Due
    in 2 weeks

Recipients: External Contact and Financial Officer for the project

Trigger: Report is overdue. The alert is generated 1 month (30 days) after the quarter ending report date if the quarterly report is not yet submitted.

Screen Name: Monitoring - Main Summary (extProjectMgmtMN_Summary)

Category: Fiscal   **Title:** Project Phase Title   **Type:** Alert
Ref Num: 1504   **Action:** Create   **User Action:** Submitted

Recipients: Project Director, Financial Officer, Contact

Trigger: Fiscal report is submitted from the External Menu

Screen Name: Monitoring - Quarterly Subgrantee Report (extProjectMgmtMN_FiscalReportsUpdate)

Category:	Fiscal	**Title:**	Project Phase Title	**Type:**	Task
Ref Num:	1506	**Action:**	Create	**User Action:**	Fiscal Report Returned

Recipients: Project Contact

Trigger: When the 'Revise' button on egProjectMgmtMN_FiscalReportsUpdate is hit by the internal staff

Screen Name: Monitoring - Fiscal Report Corrective Actions List (extProjectMgmtMN_CorrectiveActions)

Category:	Fiscal	**Title:**	Project Phase Title	**Type:**	Task
Ref Num:	1501	**Action:**	Clear	**User Action:**	Fiscal Report Returned

Recipients: Project Contact

Trigger: Either the Submit button is selected on the extProjectMgmtMN_FiscalReportsUpdate for the corresponding report or the submit button is selected internally on the egProjectMgmtMN_FiscalReportsUpdate page.

Screen Name: No Destination - Task is removed.

Category:	Inventory Reports	**Title:**	Project Phase Title	**Type:**	Alert
Ref Num:	1902	**Action:**	Create	**User Action:**	Approved

Recipients: Project Director, Financial Officer, and External Contact

Trigger: 'Approve' button on egProjectMgmtMN_InventoryReports hit

Screen Name: Monitoring - Inventory Report (extProjectMgmtMN_InventoryReports)

Category:	Inventory Reports	**Title:**	Project Phase Title	**Type:**	Alert
Ref Num:	1903	**Action:**	Create	**User Action:**	Inventory Report Returned

Recipients: Project Director, Financial Officer, External Contact

Trigger: Inventory Report is selected for return ('Revise' button on egProjectMgmtMN_ InventoryReports).

Screen Name: Monitoring - Inventory Report (extProjectMgmtMN_InventoryReports)

Category:	Inventory Reports	**Title:**	Project Phase Title	**Type:**	Task
Ref Num:	1905	**Action:**	Create	**User Action:**	Inventory Report Returned

Recipients: External Contact

Trigger: Inventory Report is selected for return ('Revise' button on egProjectMgmtMN_ InventoryReports).

Screen Name: Monitoring - Inventory Report (extProjectMgmtMN_InventoryReports)

Category:	Inventory Reports	**Title:**	Project Phase Title	**Type:**	Task
Ref Num:	1901	**Action:**	Clear	**User Action:**	Inventory Report Returned

Recipients: External Contact

Trigger: Submit Report" button is selected on the page xtProjectMgmtMN_InventoryReports for the corresponding report or an internal submit occurs ('Submit Report" button is selected on the page egProjectMgmtMN_InventoryReports for the corresponding report).

Screen Name: No Destination - Task is removed.

Category:	Modifications	**Title:**	Modification Title	**Type:**	Alert
Ref Num:	2536	**Action:**	Create	**User Action:**	Awarded

Recipients: External Modification Contact, Financial Officer, and Project Director

Trigger: Status changed to „Open-Awarded" , 'Submitted By' individual is NOT ICJI Program Staff or Fiscal Contact and Save button hit on egProjectMgmtMO_Modification

Screen Name: Modification - Main Summary section (extProjectMgmtMO_Modification)

Category:	Modifications	**Title:**	Modification Title	**Type:**	Alert
Ref Num:	2529	**Action:**	Create	**User Action:**	Disapproved

Recipients: External Application Contact, Financial Officer, Project Director, and Signatories that the application was closed and disapproved.

Trigger: Status changed to „Closed-Disapproved" and Save button hit on the main summary

Screen Name: Modification - Issues/Comments Listing (extProjectMgmtMO_IssuesComments)

Category: Modifications   **Title:** Modification Title   **Type:** Alert
Ref Num: 2002   **Action:** Create   **User Action:** Issues/Comments Review Required

Recipients: Contact, Financial Officer, Project Director

Trigger: Release All External Issues and Comments' button is selected on egProjectMgmtPR_IssuesComments

Screen Name: Modification - Issues/Comments Listing (extProjectMgmtMO_IssuesComments)

Category: Modifications   **Title:** Modification Title   **Type:** Alert
Ref Num: 2537   **Action:** Create   **User Action:** ICJI Staff Processed a Project Modification

Recipients: External Modification Contact, Financial Officer, and Project Director

Trigger: Status changed to „Open-Awarded‟ , 'Submitted By' individual is ICJI Program Staff or Fiscal Contact and Save button hit on egProjectMgmtMO_Modification

Screen Name: Modification - Main Summary section (extProjectMgmtMO_Modification)

Category: Modifications   **Title:** Modification Title   **Type:** Alert
Ref Num: 2535   **Action:** Create   **User Action:** Received

Recipients: External Contact, Financial Officer, Project Director

Trigger: Subbmitted By and Submitted By Date are both filled in for the first time and Save button clicked on egProjectMgmtMO_Modification

Screen Name: Modification - Main Summary section (extProjectMgmtMO_Modification)

Category: Modifications   **Title:** Modification Title   **Type:** Alert
Ref Num: 2564   **Action:** Create   **User Action:** Returned

Recipients: Project Director, Financial Officer, Contacts

Trigger: Status changed to „Open-Returned‟ and Save button hit on egProjectMgmtAP_MainSummary, egProjectMgmtCO_Summary, egProjectMgmtMO_Modification

Screen Name: Modification - Issues/Comments Listing (extProjectMgmtMO_IssuesComments)

Category: Modifications   **Title:** Modification Title   **Type:** Alert
Ref Num: 2523   **Action:** Create   **User Action:** Withdrawn

Recipients: Contact, Signatories, Financial Officer, Project Director

Trigger: Status changed to 'Closed-Withdrawn' and Save button hit on egProjectMgmtMO_Modification

Screen Name: Modification - Modification Details (extProjectMgmtMO_Modification)

Category: Modifications   **Title:** Modification Title   **Type:** Task
Ref Num: 2555   **Action:** Create   **User Action:** Returned

Recipients: External Contact

Trigger: Status changed to „Open-Returned‟ and Save button hit on egProjectMgmtMO_Modification

Screen Name: Modification - Issues/Comments Listing (extProjectMgmtMO_IssuesComments)

Category: Modifications   **Title:** Modification Title   **Type:** Task
Ref Num: 2511   **Action:** Clear   **User Action:** Returned

Recipients: External Contact

Trigger: Submit Application button hit on xtProjectMgmtMO_Summary

Screen Name: No Destination - Task is removed.

Category: PACS   **Title:** Individual Title   **Type:** Alert
Ref Num: 3000   **Action:** Create   **User Action:** Individuals Record Update

Recipients: Group Owner

Trigger: A user's personal profile has been updated through Individual Clearance Manager

Screen Name: User Management - Profile Details (extUserMgmt_Profile)

| **Category:** | Program Reports | **Title:** | Project Phase Title | **Type:** | Alert |
| **Ref Num:** | 2404 | **Action:** | Create | **User Action:** | Periodic Program Report Approved |

Recipients: External Contact, Project Director, Financial Officer

Trigger: „Approve' button on egProjectMgmtMN_ProgramMain was selected

Screen Name: Monitoring - Program Report (extProjectMgmtMN_ProgramMain)

| **Category:** | Program Reports | **Title:** | Project Phase Title | **Type:** | Alert |
| **Ref Num:** | 2405 | **Action:** | Create | **User Action:** | Program Report Returned |

Recipients: Project Director, Financial Officer, User who submitted the report IF he/she is not the same as the Project Contact

Trigger: Revise button hit on egProjectMgmt_ProgramMain by internal staff

Screen Name: Monitoring - Program Report (extProjectMgmtMN_ProgramMain)

| **Category:** | Program Reports | **Title:** | Project Phase Title | **Type:** | Alert |
| **Ref Num:** | 1412 | **Action:** | Create | **User Action:** | Program Reports Due in 2 Weeks. |

Recipients: External Contact and Project Director for the project

Trigger: Report is due in two weeks

Screen Name: Monitoring - Main Summary (extProjectMgmtMN_Summary)

| **Category:** | Program Reports | **Title:** | Project Phase Title | **Type:** | Alert |
| **Ref Num:** | 2406 | **Action:** | Create | **User Action:** | Submitted |

Recipients: Project Director, Financial Officer, Contact

Trigger: Program report is submitted from the External Menu

Screen Name: Monitoring - Program Report (extProjectMgmtMN_ProgramMain)

Category:	Program Reports	**Title:**	Project Phase Title	**Type:**	Task
Ref Num:	2409	**Action:**	Create	**User Action:**	Program Report Returned

Recipients: Project Contact

Trigger: Periodic Program Report is selected for return ('Revise' button on egProjectMgmtMN_FiscalReportsUpdate is selected)

Screen Name: Monitoring - Program Report Corrective Actions List (extProjectMgmtMN_CorrectiveActions)

Category:	Program Reports	**Title:**	Project Phase Title	**Type:**	Task
Ref Num:	2403	**Action:**	Clear	**User Action:**	Program Report Returned

Recipients: Project Contact

Trigger: Either the 'Submit Report" button is selected on the page extProjectMgmtMN_FiscalReportsUpdate for the corresponding report or an internal submit occurs ('Submit Report" button is selected on the page egProjectMgmtMN_FiscalReportsUpdate for the corresponding report).

Screen Name: No Destination - Task is removed.

Category:	User Management	**Title:**	User Name Requesting Access	**Type:**	Alert
Ref Num:	2803	**Action:**	Create	**User Action:**	Access Granted/Denied

Recipients: External Requestor who received a role for an Agency

Trigger: A trigger will be generated to send an alert to the external user who requested the access with the decision for approval or denial when a valid Save is performed - <Save> button is hit on extUserMgmt_AdministrationAgency

Screen Name: User Management - User Access Profile (extUserMgmt_AccessRequest)

Category:	User Management	**Title:**	Individual Title	**Type:**	Alert
Ref Num:	1802	**Action:**	Create	**User Action:**	Profile Updated

Recipients: User associated with the individual

Trigger: A user's personal profile has been updated through any area in the system that allows updates to the Individual record

Screen Name: User Management - Profile Details (extUserMgmt_Profile)

Category:	User Management	**Title:**	User Name Receiving Access	**Type:**	Alert
Ref Num:	2700	**Action:**	Create	**User Action:**	User Access Updated

Recipients: The Agency Administrator for the agency for which the access changed

Trigger: Save button clicked on extUserMgmt_AdministrationAgency or egSystemMaint_AdministrationAgencyMaint

Screen Name: User Management - Profile Details (extUserMgmt_Profile)

Category:	User Management	**Title:**	User Name whose access was deleted	**Type:**	Alert
Ref Num:	2701	**Action:**	Create	**User Action:**	User Access Updated

Recipients: The Agency Administrator for the agency for which the access changed

Trigger: Save button clicked on extUserMgmt_AdministrationAgency or egSystemMaint_AdministrationAgencyMaint

Screen Name: User Management - Administration User Maintenance Search (extUserMgmt_AdministrationMaint.htm)

Category:	User Management	**Title:**	User Name Requesting Access	**Type:**	Task
Ref Num:	2802	**Action:**	Create	**User Action:**	User Access Request

Recipients: Agency User Manager for the agency that the user requested permissions.

Trigger: An external user is Requesting access to an Agency by selecting the "Submit Request" button on extUserMgmt_JoinAgency

Screen Name: User Management - Administration Agency Request Detail (extUserMgmt_AdministrationAgency)

| **Category:** | User Management | **Title:** | User Name Requesting Access | **Type:** | Task |
| **Ref Num:** | 2800 | **Action:** | Clear | **User Action:** | User Access Request |

Recipients: Agency User Manager for the agency that the user requested permissions.

Trigger: This task is cleared when each role request is approved or denied and the „Save" button is selected on the page extUserMgmt_AdministrationAgency.

Screen Name: No Destination - Task is removed.

| **Category:** | User Management | **Title:** | User Name Requesting Access | **Type:** | Task |
| **Ref Num:** | 2804 | **Action:** | Clear | **User Action:** | User Access Request |

Recipients: Agency User Manager for the agency that the user requested permissions.

Trigger: This task is cleared when the user clicks the 'Withdraw Request' button on extUserMgmt_JoinAgency

Screen Name: No Destination - Task is removed.